



WISCONSIN

DEPARTMENT OF WORKFORCE DEVELOPMENT

Division of Workforce Solutions

Bureau of Workforce Programs

**TO: Economic Support Supervisors
Economic Support Lead Workers
Training Staff
Child Care Coordinators
W-2 Agencies**

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Workforce Policy Development Section

**SUBJECT: CARES CHANGES IN CASE
TRANSFERS & DATA EXCHANGE**

EFFECTIVE DATE: November, 2001

PURPOSE

This memo alerts staff to changes being made in CARES to resolve issues in case transfers and data exchange actions.

BACKGROUND

Due to access problems for data exchange records when cases have been transferred either between offices or between counties, there have now been modifications to the system as to how it determines current worker. The changes include the implementation of office level security to provide correct access to case data. The changes made will allow the current (transfer in) worker to access dispositions that were created both before and after a case is transferred.

Previously, workers were unable to view or dispose of records that were created before a case was transferred. The error message "320 – Requestor not a supervisor, administrator or worker for caseload" was displayed when any records for a transferred individual should have been displayed on DXRL. Even dispositions that were previously completed by another worker would trigger the error message, leading the current worker to believe that data existed but was for some reason not accessible. The access issues for transferred cases will be resolved with changes going into production in November of 2001.

Another problem now being addressed is the targeting process used by most of the data exchange matches, which previously allowed disposition records (matches) to be assigned to a closed case. This meant that when a recipient had one or more cases, some open and some closed, the system sometimes assigned the disposition and alert to the first case number

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Non W-2 ☒ **W-2** ☒ **CC** ☒

PRIORITY: Medium

located, even if the case was closed. This issue will be resolved with the changes moving to production, and only open cases will be targeted.

In addition, logic has been incorporated which will create informational alerts ("FYI" alerts) if there is more than one worker for an individual. This means that if there is more than one open case, or AGs with different workers, multiple alerts will be created, the original alert with the disposition which needs to be completed on DXRU, and one or more FYI alerts, depending on the number of other workers involved.

Workers will not get more than 1 alert if they are assigned to more than 1 of the individual's AGs: FS, W2, CC and MA, in that priority order. The original alert will go to the worker on the first open AG, using the case priority code in reference table TDCP (see attached). This means that AGs with the case status of O (open), C (closed less than 31 days) and pending, will be targeted and the primary worker on the highest priority AG will receive the disposition alert and workers on other AGs will receive the FYI alert. Cases closed more than 31 days will not be targeted.

There will first be a fix to the process which determines whether there is at least one open case prior to creating any disposition and alert. Then, because recipients may be on more than one open case, it will be necessary to employ a targeting hierarchy. An FS case (or AG) will receive the alert and disposition first, followed by a W2 case, a Child Care case and then an MA case. (See priority codes on reference table TDCP.) These criteria will be followed when the new information is received as a result of any system generated request. If a request is worker generated (via DXRQ for example), then the resulting alert would be assigned in the same manner as above, following the same AG priority. All workers within the same office will have access to the data.

New FYI alerts are:

318FYI - New data on DXDN
319FYI - New data on DXSX
320FYI - New data on DXQC
321FYI - New data on AIIP

322FYI - New data on DXSA
323FYI - New data on DXSN
324FYI - New data on DXPQ

Due to concerns on the part of the federal government relating to access to IRS and BEER data received in data exchange matches, a message indicating that it is federal tax information and that safeguarding is required has been added to the DXUI and DXBE screens. There will be no change to the screen functionality.

CONTACT

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Note: Email contacts are preferred. Thank you.